

North Florida DORA



ETA Projects

North Florida DORA ETA Projects

- e-file Customer Number Pilot Survey
- Alternative Payment Methods Survey

On-Line e-file Customer Number (ECN) Survey

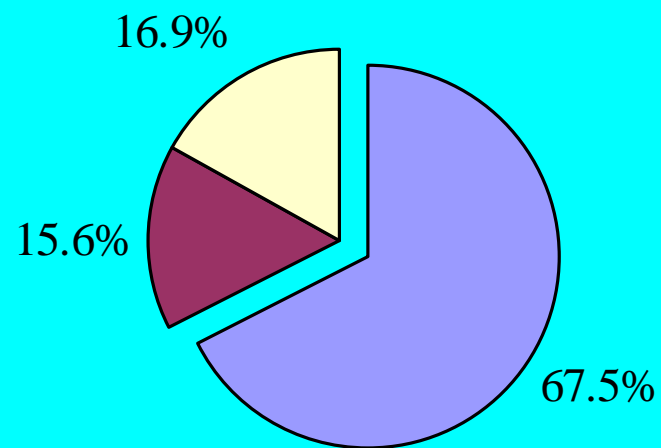
- Approximately 8 million returns from Tax Year 1997 selected to receive ECNs
- 8 percent usage (660,209)
- Survey TPs about their experience
- Survey approved by OMB
- Survey mailed July 19th

ECN Pilot Survey

Survey Summary

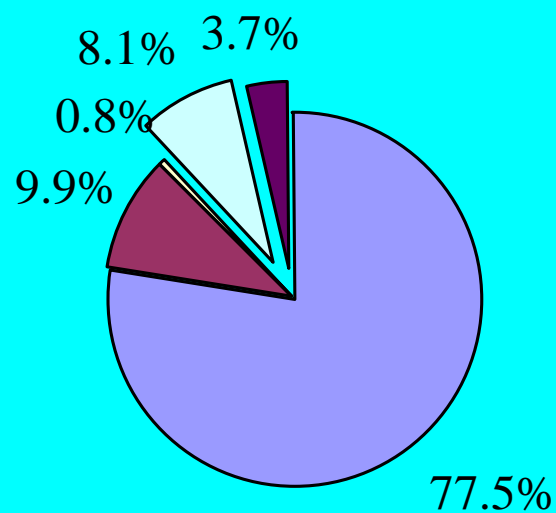
- 2,500 surveys mailed
- 15 undeliverable
- 764 surveys completed

Was ECN Postcard Received?



Yes No Not Sure

Who Prepared TY1998 Return?



self/spouse

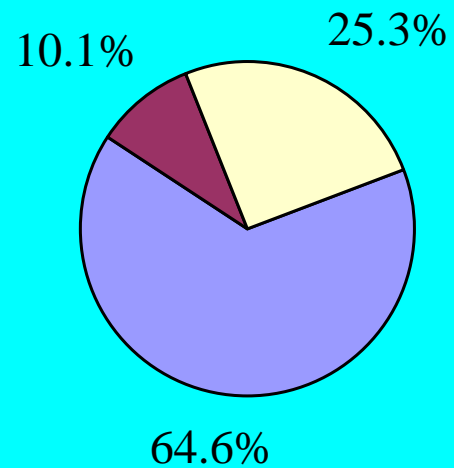
family/friend

VITA & TCE

paid preparer

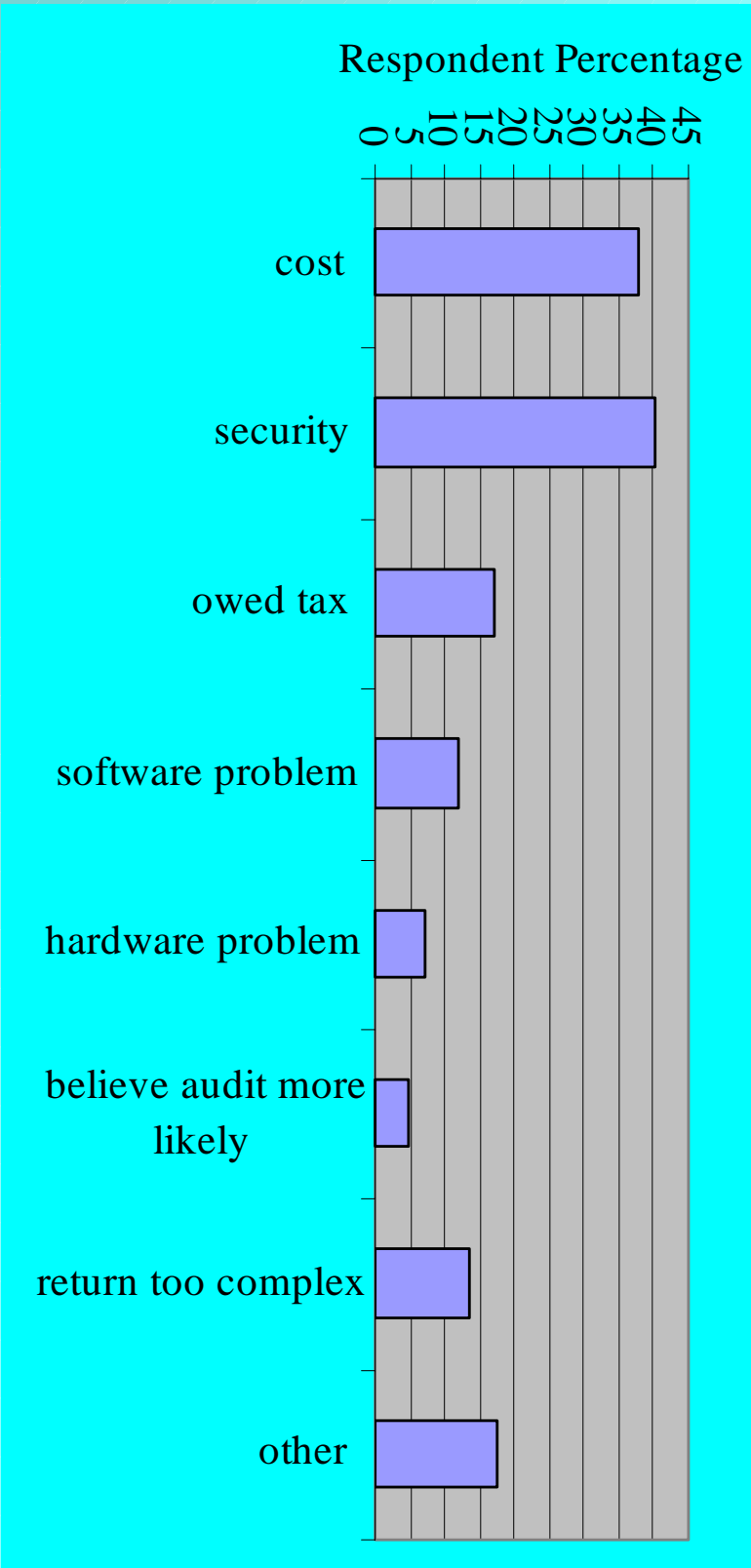
extension/not req'd to file

How was TY1998 Return Filed?

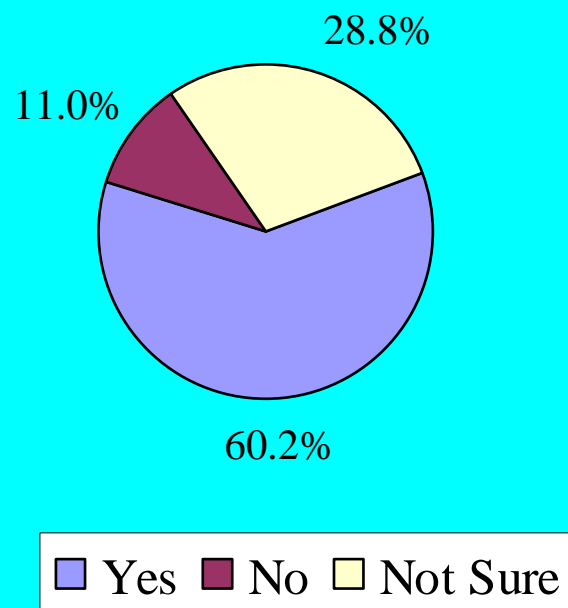


■ paper ■ on-line ■ on-line w/ ECN

Reasons Did Not e-file



Would TP Use ECN In Future?



ECN Pilot Survey

Other Findings

- Consistent Favorable Opinion of Pilot
- Over 66 Percent Believe Postcard Provided Adequate Information
- Over 60 Percent Would Use an Alternative Payment Method in Future

ECN Pilot Survey

Recommendations

- Verify Method of Excluding Paid Preparer Returns is Correct
- Highlight (Through Advertising, ECN Postcard, and Agreements With Vendors) the Security of Electronic Filing

ECN Pilot Survey

Future

- Will survey again in FY2000
- Survey will be revised based upon information gathered from this survey

Alternative Payment Methods

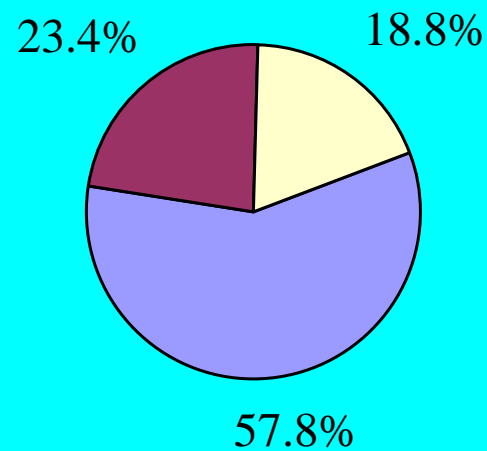
- Payments using credit card and direct debit
- Approximately 115,000 TPs made \$300 million in payments
- 70,000 EROs mailed a Marketing Toolkit in February 1999

Alternative Payment Methods

Survey Summary

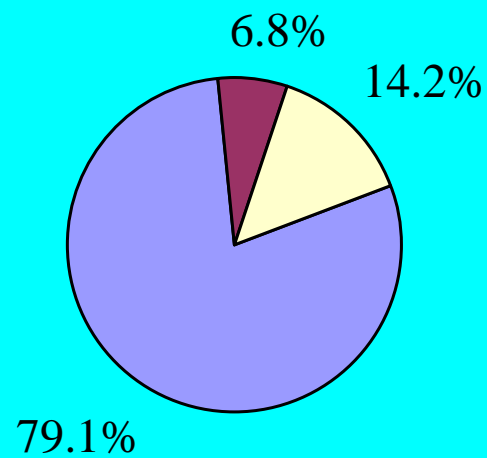
- 4,000 surveys mailed
- 16 undeliverable
- 1,070 surveys completed

Was Toolkit Received?



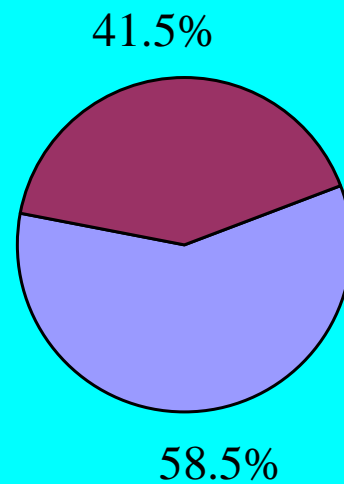
■ Yes ■ No ■ NotSure

Was Sufficient Information Available?



■ Yes ■ No ■ NotSure

Did You Offer These Alternatives?



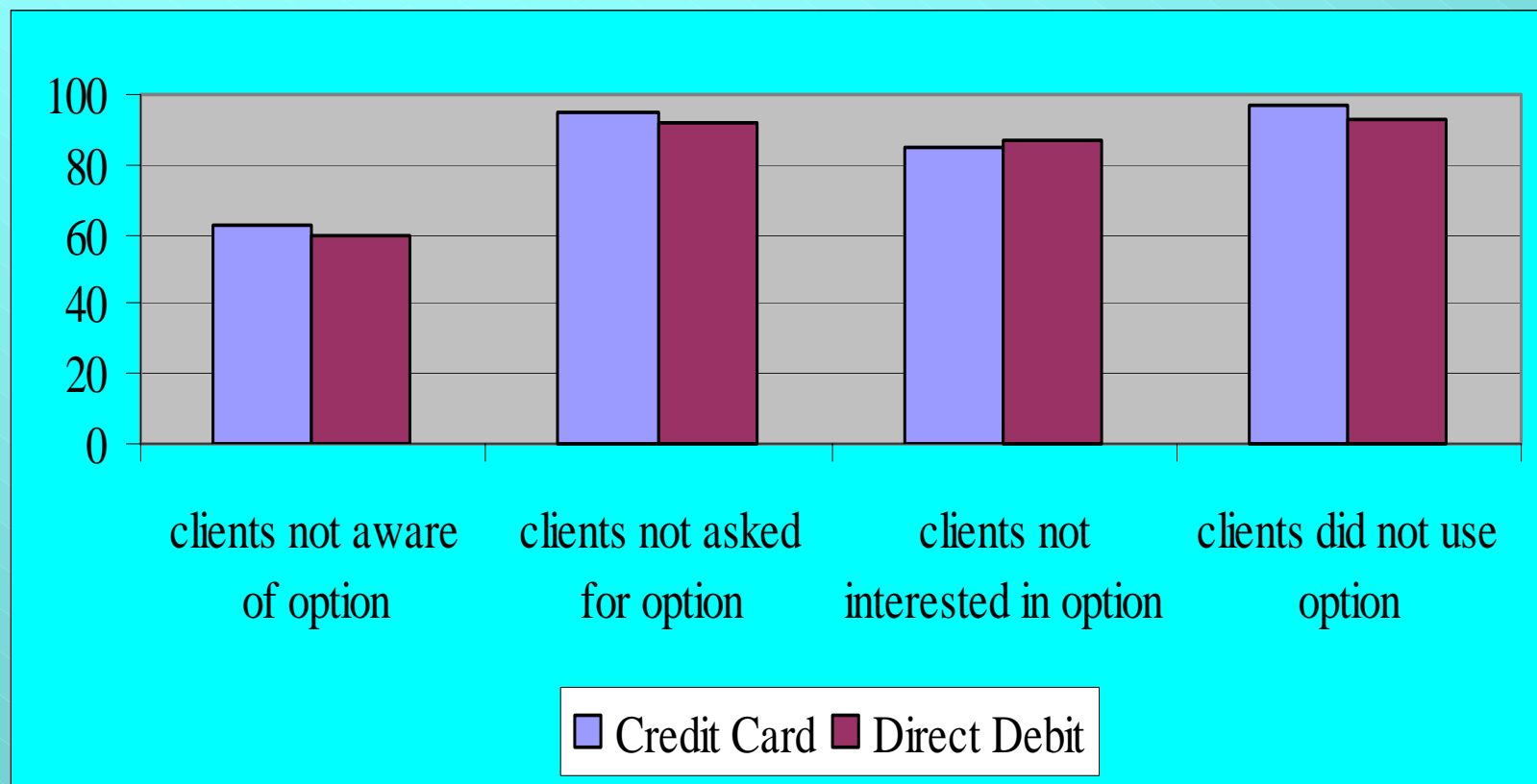
Yes No

Alternative Payment Methods

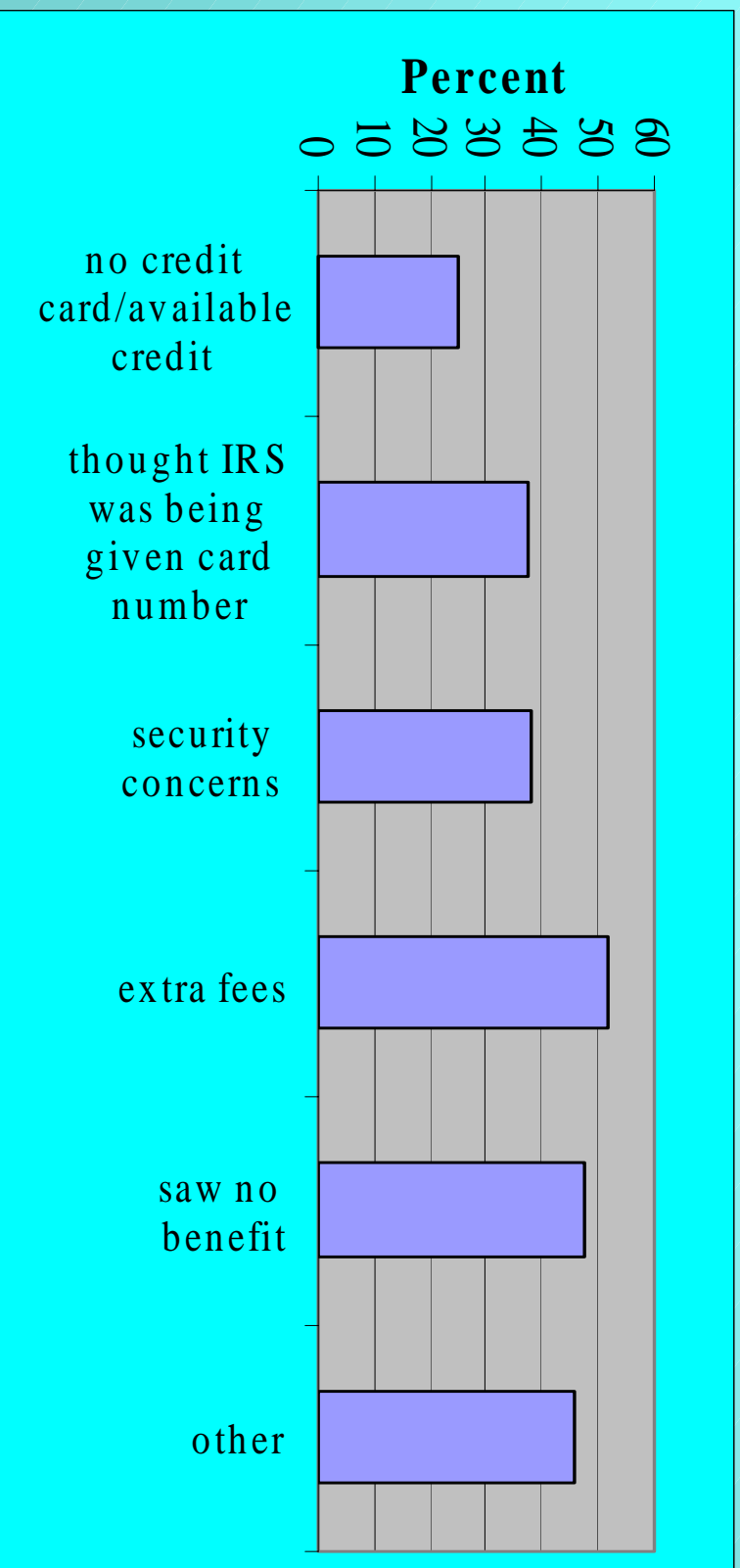
Reasons Not Offering These Options

- 25.3% easier to have clients send payment
- 8.2% too difficult to explain
- 6.4% too many options to explain
- 1.1% did not meet with client
- 12.7% other

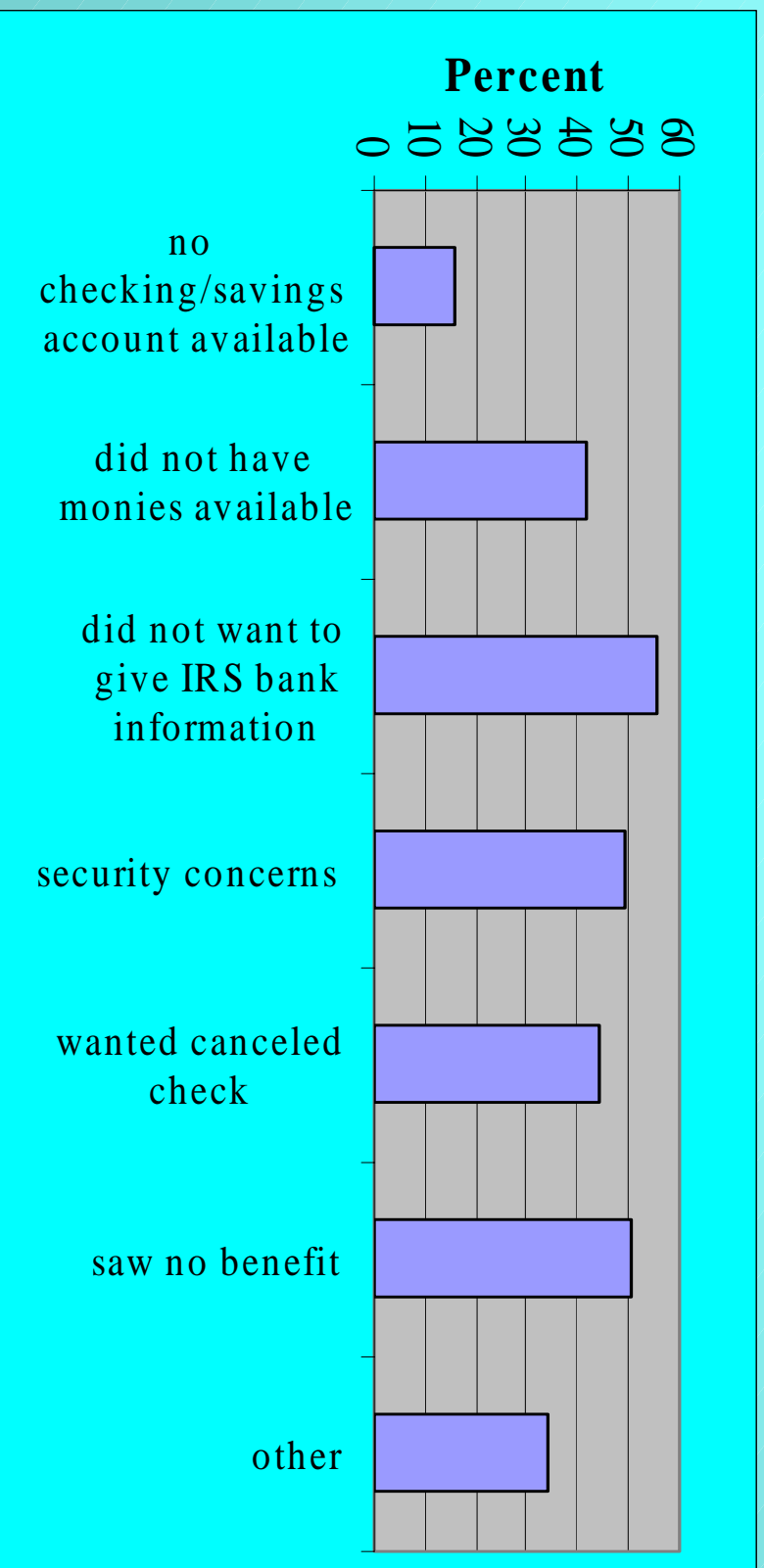
Option Awareness (Few/None of Clients)



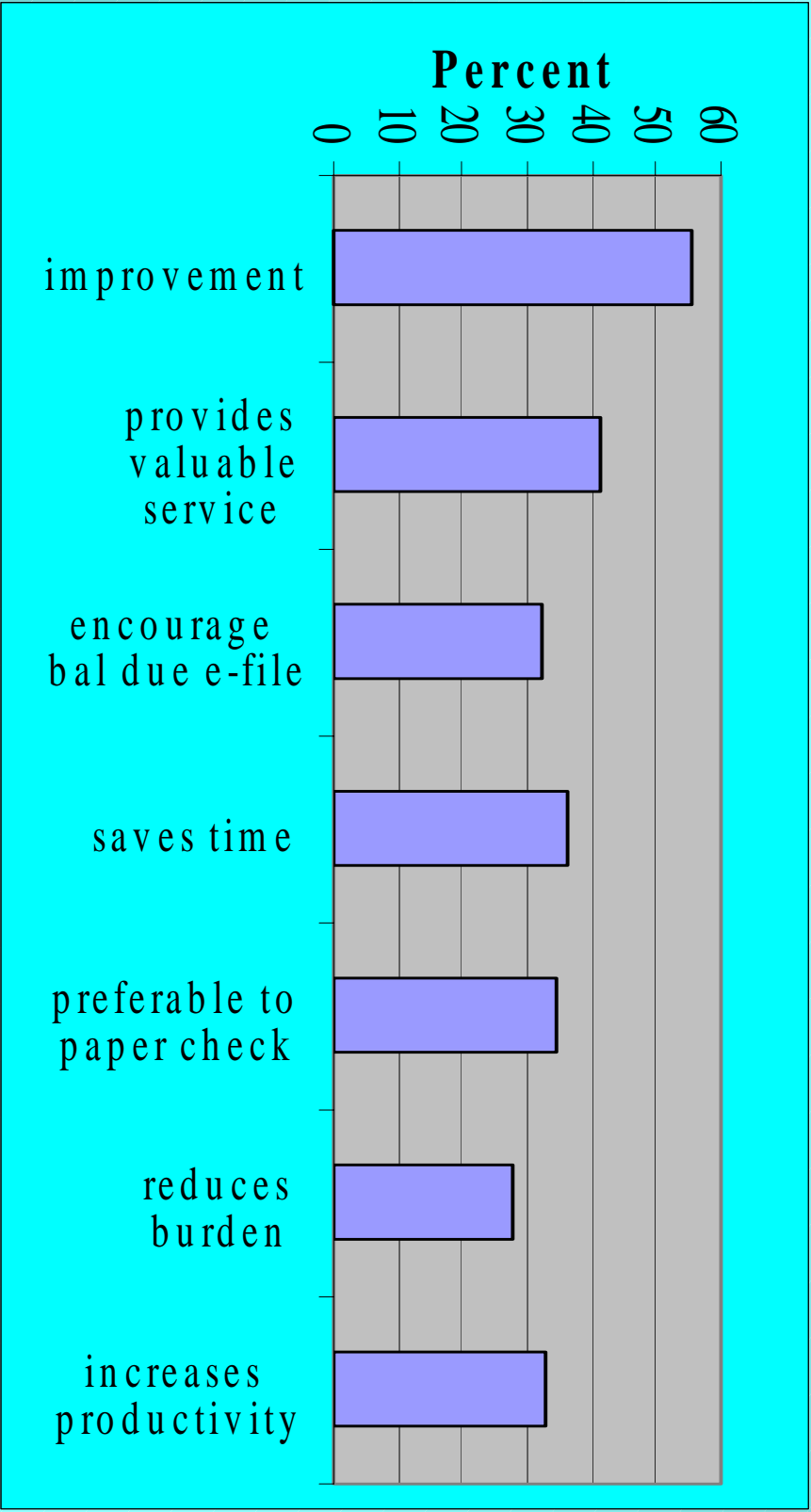
Top-Two Box Reasons for Not Using Credit Card



Top-Two Box Reasons for Not Using Direct Debit



Alternative Payment Views



Alternative Payment Methods

Future

- Analysis and report still needs to be completed
- Survey will be repeated next year